THE SENIORS MARKET FOR TRAVEL TO BRITISH COLUMBIA

Travel Patterns of Generally Retired Affluent Mobile Seniors (GRAMS) In Southwest USA

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

89-03810/

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Canadian Cataloguing in Publication Data

Main entry under title:
The Senior market for travel to British Columbia

"Funded by Canada-British Columbia Tourist Industry Development Subsidiary Agreement". Cf. Acknowledgement.
On cover: Economic & Regional Development Agreement, Canada, BC.
ISBN 0-7726-0880-6

1. Aged - Travel - British Columbia. 2. Aged - Travel - Southwestern States. 3. Tourist trade - British Columbia. I. Tourism Research Group. II. Fleischman Field Research. III. British Columbia. Ministry of Tourism and Provincial Secretary. IV. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. IV. Canada/BC Economic & Regional Development Agreement. V. Title: Travel patterns of generally retired affluent mobile seniors in southwest USA. VI. Title: Generally retired affluent mobile seniors in southwest USA.

G155.C3S46 1988 381'.4591711044 C89-092003-6

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Prepared for :

Industry, Science and Technology Canada
Ministry of Regional Development
Ministry of Tourism and Provincial Secretary

funded by :

Canada - British Columbia Tourist Industry
Development Subsidiary Agreement

prepared by :

The Tourism Research Group
Fleischman Field Research

July, 1988

ACKNOWLEDGEMENT

This study was funded through the Canada-British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost shared equally by the governments of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a federal/provincial Management Committee established for the administration of the Agreement.

The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada
Industrie, Sciences et Technologie Canada

Province of British Columbia
Ministry of Regional Development

Province of British Columbia
Ministry of Tourism and Provincial Secretary

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BACKGROUND

Interest in the senior market for travel has increased substantially in recent years for several good reasons:

- its size;
- its growth rate;
- seniors are more healthy, active and better educated than ever before;
- seniors have more disposable time and many travel mid-week and in off-peak periods;
- seniors are relatively affluent in terms of disposable income; and
- seniors travel further and stay longer than the rest of the travelling population.

SIZE AND GROWTH

Over the next 15 years, the growth rate for Canada's older population will be dramatically higher than that for the rest of the nation. For instance, between 1981 and 1991, the population aged over 65 years will show an average annual increase in size of 3%, while the entire population will be expanding at a rate barely above 1% per year.

In 1986, there were over 5 million Canadians aged 55 years and over. This age group is expected to increase to just over 6 million by 1996. As Canada enters the 21st century, the population aged 65 years of age or more will number nearly 4 million people. In the second decade of the next century, the Baby Boom Generation (those born between 1946 and 1966) will enter the ranks of the senior population. It will then escalate in size, reaching 6 million by the year 2021 and 7.5 million by the year 2031. Thus in the next 45 years, the older population is expected to triple in size.

In the United States in 1984, people aged 55 and up accounted for 21 percent of the population; by the year 2020 this age group will make up 31 percent of all Americans.

AFFLUENCE

The notion that seniors have little money to spend on luxuries and must watch every penny is an erroneous one. Most of today's seniors have enjoyed over 25 years of uninterrupted prosperity, now own their homes, have paid off most personal debt and have accumulated savings that sustain a good lifestyle. They are also beneficiaries of a number of state programs, such as the RRSP program, which result in their having greater levels of disposable income than many other segments of the population.

Marketers in all aspects of business life are now taking note of the fact that while seniors currently represent just a quarter of the U.S. population, they account for 40% of all consumer demand and 51% of all discretionary spending. Sixty-nine percent of the total net worth of the U..S. is controlled by people 50 years old or better. According to a study released by the U.S. Conference Board, *Midlife and Beyond*, the average household income of those aged between 50-65 is about $30,000, 20 percent higher than the national average. Even households between 65-75 have more discretionary income per person than those under the age of 45.

PROPENSITY TO TRAVEL

With time to spare and money to spend, both Canadians and Americans over the age of 55 are willing and able to travel. Between 1980 and 1986, the travel rate for senior Canadians increased substantially. In 1986, they embarked on 10.8 million overnight trips and 6.7 million day trips within Canada alone, up 24% and 37% respectively from 1980. Due to their accelerated trip taking, these older travellers now represent 14% of the overnight domestic travel market. Table 1 provides statistical data to illustrate these trends.

In the U.S. there were nearly 51 million people aged 55 plus in 1985 and of these, 59 percent took at least one trip that year according to the U.S. Travel Data Centre. The American "mature market", as it is sometimes described, accounted for 162.7 million pleasure trips in 1985, equivalent to an average of 5.4 trips per traveller. Figure 1 shows the share of various types of leisure travel held by the mature market. In 1984, the 50+ traveller accounted for an estimated 30 percent of all domestic travel by Americans, 30 percent of all air trips, 32 percent of all hotel/motel nights and 72 percent of all RV trips.

One third of all passports issued to Americans in 1982 were to persons 50 years or older. In 1983 the percentage increase for passports issued to the 50+ group was twice as great as that for those under 50.

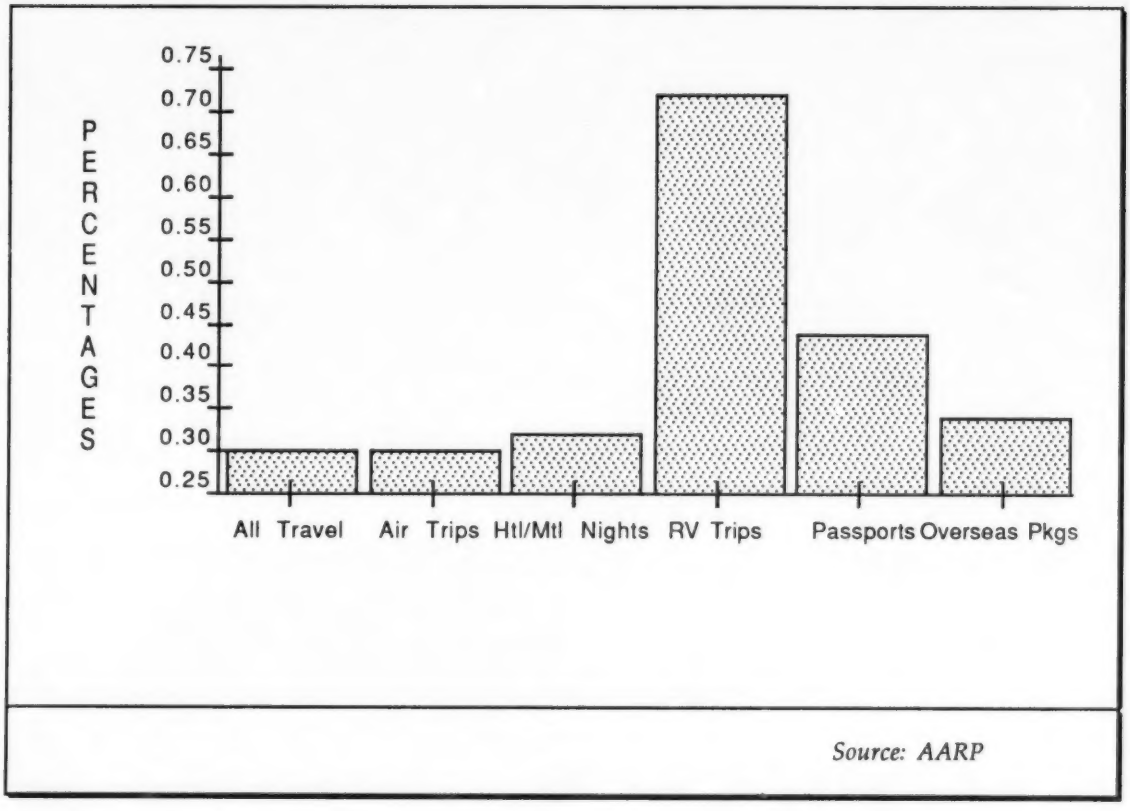
Table 1
CANADIAN POPULATION AND DOMESTIC TRAVEL BY AGE
1980 and 1986

	Volume		Distribution		Change
	1980	1986	1980	1986	1980 1986
	000's		Percentage		Percentage
Population[1]					
Total	18,056	19,632	100	100	9
15–54	13,825	14,790	77	75	7
55+	4,231	4,842	23	25	14
Overnight Trips					
Total	74,847	75,275	100	100	1
0–14	15,472	13,135	21	17	15
15–54	50,307	51,304	68	68	2
55+	8,708	10,836	12	14	24

[1] Based on an average of quarterly Labour Force Survey population which excludes Canadians under 15 years of Age. *Source: Canadian Travel Survey, special tabulations*

Figure 1

SENIORS' SHARE OF U.S. TRAVEL MARKET



Source: AARP

TRAVEL CHARACTERISTICS

In addition to the volume of travel undertaken by the mature market, their travel characteristics make them especially attractive. While older travellers do not appear to travel quite as frequently as their younger counterparts, when they do leave home they travel further away and for longer periods. According to the Canadian Travel Survey in 1986, 21% of mature travellers set off for more than three weeks compared to only 14% of the total population. According to the U.S. Travel Data Centre, the mature segment stays away from home an average of 7.3 nights which is 60% more than other U.S. travellers. Furthermore, duration of trip increases as age increases-- those aged 65+ spend almost twice as long away from home as the rest of the travelling population.

Mature travellers have greater flexibility regarding when to travel. Over half their trips are taken mid-week. By comparison just about a third of the trips taken by younger travellers occur at this time.

Mature travellers are seasoned travellers. More than 90 percent of travellers over the age of 55 are repeaters according to a study undertaken in 1985 by the U.S. Travel Data Centre and the American Association of Retired Persons (AARP). Fifty-plus travellers are more likely to travel for entertainment—sightseeing, theatre, historical sights, shopping—than for outdoor recreation.

While a smaller percentage of 50+ travellers use hotels and motels for their travel lodging, their stays are longer so their share of total bednights sold is actually higher than other segments of the population. For cabins and condominiums, the 65+ group spend on average almost twice as many nights as the under 50 population, and for RVs almost three times as many nights (see Table 2).

Figure 2 shows that propensity to use air transportation increases with age. Use of RVs increases rapidly for the 50 - 54 age group, peaks between age 55 and 59 and declines equally dramatically after age 59 according to the AARP study. While RV use declines significantly after 59, this age group still uses RVs more than the 50 - 54 age group and the under 50 population.

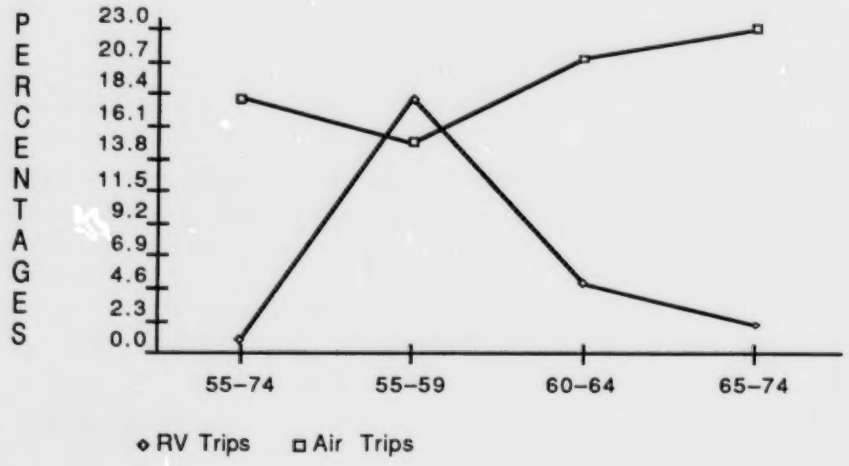
This declining use of RVs after the age of 59 should be contrasted with the increased use of package tours as shown in Figure 3 and the increased use of travel agents.

Table 2
LODGING TYPE USED BY SENIORS
(Average Nights)

	Rented Cabin or Condominium	Owned Cabin or Condominium	Camper, Trailer, RV
Total Population	6.8	6.4	6.1
Under 50	6.4	5.7	5.4
Over 50	7.4	7.5	6.9
65+	11.9	10.6	15.1

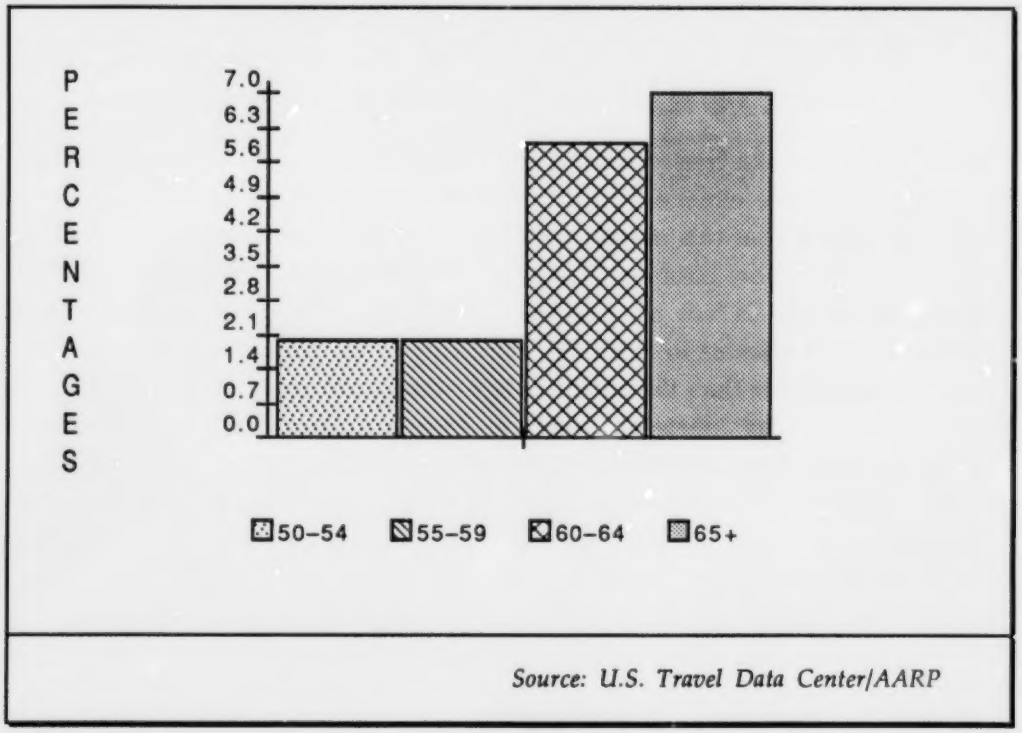
Source: U.S. Travel Data Center/AARP (1984)

Figure 2
AIRPLANE AND RV USE BY AGE (1984)



Source: U.S. Travel Data Center/AARP

Figure 3
USE OF PACKAGE TOURS



Source: U.S. Travel Data Center/AARP

Canadian mature travellers spend slightly more per trip ($237) than the rest of the travelling population ($234). It should be remembered, however, that this trip spending is spread over lengthier trips. Nevertheless, spending on travel by seniors generates substantial revenues. In 1986, Canadian mature travellers spent an estimated $1.6 billion on domestic overnight trips alone.

TARGET MARKETS AND MARKET SEGMENTATION

There appears to be a consensus in the business literature that the worst mistake a marketer can make when selling to the senior market is to make references to aging and imply that this market is in someway significantly different than the rest of the population. Lumping seniors together and marketing to them based on chronological age is not an effective marketing strategy. Another common mistake is for marketers to aim their marketing at the chronological age of their target market rather than the cognitive age—that is the age that people feel. In a recent article on the "ageless market" in American Demographics, David Wolf points out that those factors which distinguish this market are the "watershed events" in seniors' lives rather than their chronological age. These watershed events are the means whereby people define themselves. Changes in marital status, employment and economic status effect not only how people in this market view themselves, but how and where they travel and how they respond to different marketing strategies. Table 3 shows how such factors as marital status, employment, economic status, area of residence and educational status vary with age. Newly retired persons may increase the frequency of their travel, the distance travelled and the length of stay. Widowers who, while married, had travelled independently, may shift to group travel. Similarly, the shift in travel choice from a first class luxury tour to a more budget conscious tour often occurs after a watershed event such as retirement or loss of a spouse. While the age factor provides a "short-hand" way of segmenting the market, it is important to remember that the watershed events described above are the real determinants of behaviour.

In summary, the seniors market is not a homogeneous market but can and should be further categorized into a number of segments based on the needs and interests of the mature travellers. Saga International Holidays, a multinational tour operating company that specializes exclusively in senior's travel, has identified at least eight lifestyle categories for seniors: SUPPIES (senior urban

Table 3
DEMOGRAPHIC CHARACTERISTICS OF SENIOR TRAVELLERS

	Age 55–64 %	65–74 %	75+ %
Marital Status			
Married	75	60	44
Widowed	13	29	38
Divorced	7	4	2
Single	5	5	10
No Answer	–	2	6
Employment Status			
Employed	47	16	17
Unemployed	13	8	8
Retired	30	74	71
No Answer	10	2	4
Income Status			
Under $20,000	31	48	43
$20,000–$50,000	42	27	18
$50,000+	13	5	3
No answer	14	20	36
Education			
Under High School	28	31	25
High School	36	34	26
Some College	13	13	17
College Degree	13	14	15
Graduate Work	10	8	7

Source: U.S. Travel Data Center (1986)

professionals, generally 55-64); RAPPIES (retired affluent professional), suburban seniors, culture vultures, independent singles, newly widowed, homebodies, and sunbelters. Each of these segments has different needs and wants when it comes to travel and it would be foolhardy not to delve deeper into the segmentation issue.

While it is important for marketers of travel not to emphasis the age of senior travel consumers, the AARP study did find some correlation between age and travel behaviour that indicated the usefulness of subdividing the 50+ market into the following three groups:

The Younger, mature traveller (55 to 59 years). These travellers are likely to still be in the workforce and in peak earning years. The majority are "empty nesters" and, consequently are in a position to afford luxury type travel. Time, however, continues to be a premium so this group takes shorter trips than their older counterparts and stays closer to home

The mid stage, mature traveller (60 to 64 years old). Travellers in this group are often at a crossroads between work and retirement. With increased amounts of leisure time, they may be inclined to travel to more distant and exotic places.

The older mature traveller (65+). These travellers have mostly reached retirement age. They have greater flexibility to travel off-peak, at odd times of the day and in all seasons. As time progresses, their earning power decreases and changes in marital status and health concerns may affect their travel patterns.

Given the sheer size of the senior market and the fact that not all seniors are equally predisposed to travel, it makes sense to target one's efforts to those members of the senior market who show greatest propensity to travel. In this regard, seniors are no different than the rest of the population; propensity to travel is directly related to education and income. For this reason, the Ministry of Tourism, Recreation and Culture conducted some research into what was described as the GRAMS market for travel to British Columbia. The acronym GRAMS stands for Generally, Retired, Affluent, Mobile Seniors. The objectives, scope and findings of that research are summarized in the next chapter and represent the first attempt to compile primary data concerning the perceptions of and interest in British Columbia as a travel destination.

THE GRAMS STUDY

OBJECTIVES AND FOCUS

In February 1988, the Ministry of Tourism, Recreation and Culture of British Columbia commissioned Fleischman Field Research of San Francisco to undertake a survey of a sample of generally Retired Affluent Mobile Seniors who live in the Southwestern United States. The objectives of that study were:

- to describe the current travel behaviour of this segment;
- to measure attitudes toward future B.C. travel and the kinds of attractions likely to encourage it; and
- to determine media habits and interests with regard to pleasure travel information.

Criteria for inclusion in the study included:

1. residing in either North California, South California or Arizona;
2. being between 55 and 74 years of age;
3. having an annual household income of $35,000 or more; and
4. having either taken a trip exceeding 1,000 miles in length over the previous twelve months or planning to take such a trip in the next twelve months.

A total of 448 interviews were conducted with approximately 150 in each of the three areas of residence listed above. Half the interviews were conducted with males and half with females. A copy of the questionnaire is enclosed in Appendix A.

MARKET CHARACTERISTICS

Figure 4 shows that the members of the GRAMS market interviewed for this study are highly educated, earn substantial incomes and experience changes in employment status with age. A higher proportion of older mature travellers (65 years plus) in the sample were from Arizona, whereas younger mature travellers were more likely to reside in California.

Figure 4.1
EDUCATIONAL CHARACTERISTICS OF THE GRAMS MARKET

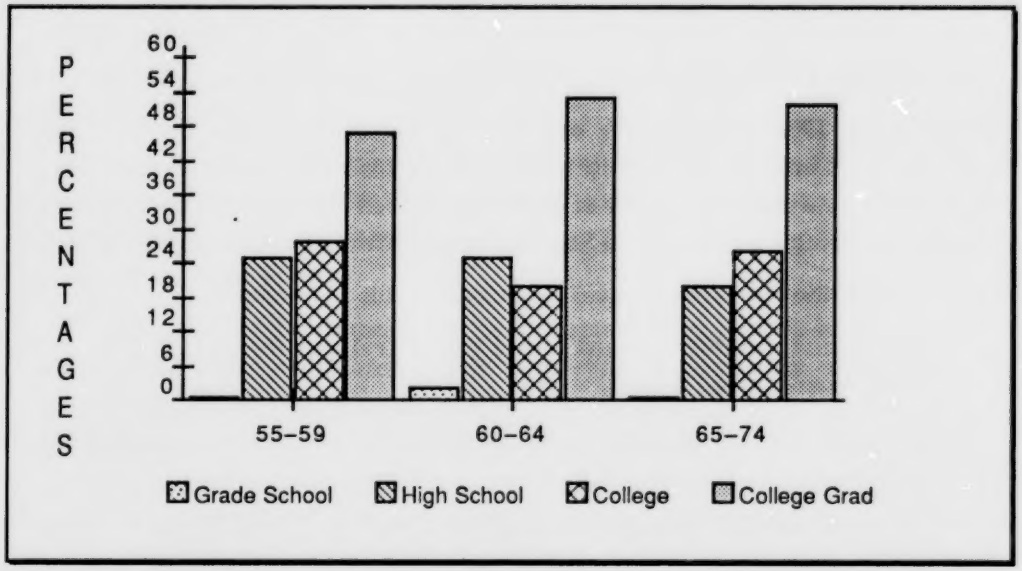


Figure 4.2
EMPLOYMENT CHARACTERISTICS OF THE GRAMS MARKET

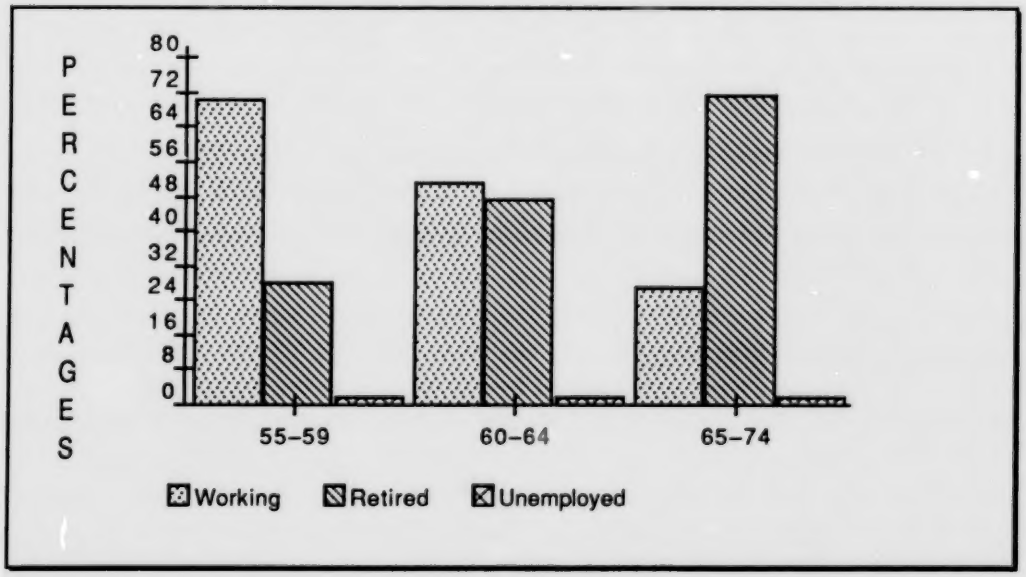
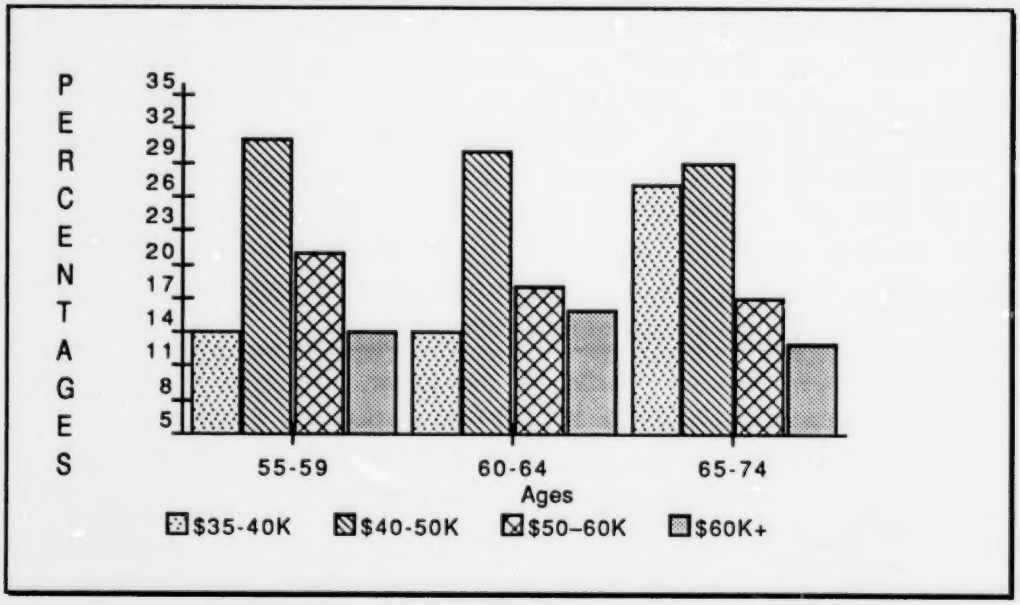


Figure 4.3
INCOME CHARACTERISTICS OF THE GRAMS MARKET



Average Income:

Age	Average
55–74	$55,400
55–59	$56,100
60–64	$58,000
65–74	$53,600

The GRAMS market identified in this survey is significantly better educated and more affluent than the seniors travel market as a whole. For example, 76% of the GRAMS have had some post-secondary education compared to 25% of the Canadian mature travel market as recorded by the CTS survey and 36% of the American market as recorded by the U.S .Travel Data Centre. In addition, 28% of the GRAMS reported incomes in excess of $50,000 compared to 11% of the U.S. mature travel market overall. The affluence and education level of the GRAMS market suggest that its members have somewhat discriminating and sophisticated preferences in travel and are drawn to destinations that offer a high standard of facilities and attractions. Table 4 shows that while most demographic characteristics do not differ significantly between those GRAM travellers with low versus high levels of attraction to British Columbia, those with the highest attraction level are more likely to have college degrees.

As has been discussed earlier in this paper, retirement is an important watershed in a person's life. In the GRAMS market, the percentage of retirees increased from 28% in the 55-59 age group to 71% in the upper age group. It is also interesting to note that part-time work grew from 6% of all employment in the youngest age bracket to 48% in the oldest group.

The GRAMS data suggest that average annual income of this market does not decline significantly with age. GRAMS aged 55-59 reported an average household income of $55,400 whereas their older counterparts, aged between 65 and 74, reported $53,600. While expenses for the latter group may increase slightly (eg medical expenses), this group would appear to be as capable financially and physically of being attracted to B.C. for a vacation trip.

TRAVEL BEHAVIOUR AND PLANS

Destination Choice

GRAMS represent an attractive travel segment in that almost two-thirds of them have taken a pleasure trip of over 1,000 miles or more within the past 12 months (Table 5). Furthermore, over 80% of them stated an intention to take such a trip within the next 12 months. Eighty-five percent of the GRAMS who were contacted qualified as either having taken a pleasure trip of 1,000 miles or more in the past 12 months or planning to take one within the next 12 months.

Table 4

ATTRACTION TO BRITISH COLUMBIA

	Total	Low	Med.	High
Average age (years)	64	64	64	64
College Degree + (%)	51	50	54	59
Average Income ($000)	55	56	56	53
Residence (%)				
No. California	35	36	38	33
So. California	32	31	32	32
Arizona	33	33	30	35
(No. of Travellers)	(448)	(136)	(146)	(162)

Table 5

TRAVEL BEHAVIOUR OF GRAMS MARKET

No. of Trips Taken/Planned	Past 12 mos. %	Next 12 mos. %	Past/Next combined %
None	37	18	15
One	32	38	17
Two	18	28	24
Three	8	10	14
Four +	5	6	30
Average	1.2	1.5	2.7
(No. of Respondents)	(530)	(530)	(530)

Table 6

DESTINATIONS VISITED AND PLANNED TO BE VISITED

Destination	Have Visited Past 2 Years %		Plan to Visit Next 2 Years %	
U.S.A.				
West of Mississippi R.	34	(Under 65's)**	33	
East of Mississippi R.	49		47	
Hawaii	16		15	(Under 60's)*
Alaska	7	(65+)***	13	(60 to 64's)***
Canada				
B.C.	9	(60+)**	4	
Other W. Canada	4		5	
Ontario	1		1	
Quebec	2		2	
Other E. Canada	2		2	
Other Places				
Bahamas, Bermuda, Caribbean	8		7	
Central America, Mexico	11	(60 to 64's)**	12	(60 to 64's)***
South America	3		3	
Europe	19	(60+)*	21	
Africa	1		1	
Asia, India, Far East	7		11	(60+)**
Australia, New Zealand	5	(65+)**	11	(60 to 64's)**
Other Pacific Islands	2		2	

Note: Popularity by age refers to age groups indicating strongest preference for destination. Blank field means similar responses by age.

* Much greater preference

** Greater preference

*** Slightly greater preference

Source: Fleischman's GRAMS survey

Travellers 60 years and older appear to plan more frequent long-haul trips than the 55 to 59 age group. The older traveller is presumably in a better position to plan distant travel because of fewer time constraints.

Table 6 shows 9% of GRAMS travellers reported having visited British Columbia within the past two years, with 3% naming British Columbia as their most recent trip. The largest proportion of trips taken or planned are to destinations in the continental United States. Europe was the next most popular destination, followed by Hawaii. B.C. was the sixth most visited place of the 17 destinations identified. When it comes to places intended to visit in the next two years, British Columbia drops to 11th on the list and has the greatest percentage decrease (-5%) in mentions as a place visited compared to a place that might be visited in the future. The Expo 86 factor may account for this apparent decline. The 9% past visitation rate may be higher than usual due to the occurrence of this one-time, major event. The 4% of the sample intending to visit B.C. in the future might reflect normal, pre-Expo patterns. It is also likely that Canada in general and B.C. in particular, may be experiencing a flattening of the California market's growth curve .

The GRAMS intentions data certainly indicates a growing interest in long-haul destinations. Those with highest potential for increased visitation are Alaska (+6%), Australia and New Zealand (+6%) and Asia, India and the Far East (+4%). It is possible that B.C. is in jeopardy of losing market share at the expense of these places, although it must be recognized that the latter two destinations are, in fact, multiple destinations with great potential to attract visitation. It is also worthy of mention that all of these destinations are in the Pacific Rim. While these Pacific Rim destinations could represent competition to B.C., they could also represent an opportunity to present British Columbia as a gateway to the Pacific Rim experience, either north to Alaska or west toward the Orient.

Visitation to B.C. was most popular with GRAMS 60 years of age and older. Approximately 10% of the 60-64 year olds and 11% of the 65 year olds and over had made trips to B.C. in the previous two years. By comparison only 5% of the under 60's had visited the province.

The data confirm other analyses that suggest that far-away destinations are most popular with the older age groups. For example, over 22% of travellers 60 years of age and over went on a trip to Europe in the past two years, whereas only 8% of the 55 to 59 age group did the same. Nine percent of the 65 plus age group

travelled to Australia and New Zealand compared to 2% for the under 65's. Hawaii attracted 24% of the younger GRAMS versus 13% of the 60 to 64 year olds and 10% of the travellers aged 65 to 74.

With more time on their hands, the older travellers are able to take trips to more distant places. The retired traveller is interested in and has time for cultural and educational experiences found in exotic places. The employed mature traveller is still influenced by the desire to escape the stress of work and to recuperate in an environment relatively free from the adjustments usually associated with strange and unusual settings. British Columbia could appeal to both groups in slightly different ways. At the present time, the province has greater appeal to the older group and this appeal could be strengthened by positioning the province as having foreign mystique and the chance to experience cultural and geographical diversity in a safe and attractive environment. The European and Asian "flavour" of Vancouver could be packaged with the frontier experience still available in parts of the interior to offer a unique blend of old and new cultures that is both accessible and safe. If more exotic destinations such as the Far East, Australia and New Zealand become more accessible to this market, however, competition will stiffen considerably.

In order to attract more of the young mature market, strategies that emphasize the fun, relaxing and quality experiences available in B.C. should be employed. Since these seniors are already well travelled and sophisticated in their demands, the best opportunities lie in attracting special interest groups such as ardent fishermen, golfers, skiers, nature observation enthusiasts etc. who wish to use their valuable vacation time to pursue their hobbies and interests in an environment with world class product. There seems little point in trying to compete head on with Hawaii and Mexico that offer sun, sand and relaxation in deluxe resort settings.

Seasonality

Figure 5 shows that the most likely time to travel to B.C. for all age groups is the summer (July and August). Spring (March to June) is the next most preferred time, followed by Fall. The potential for winter travel out of the California and Arizona markets is almost non-existent—climate is obviously a crucial factor for GRAMS in chosing when or when not to visit. This trend was most pronounced with the Arizona sample who were also skewed toward older travellers. Approximately 68% said that they would like to visit in the summer. None of

them mentioned winter as a desired time. Since participation in winter sports is likely to decrease with age, it would be advisable to focus on the younger mature traveller (50- 59) when attempting to increase shoulder season travel . This will be difficult as there are numerous attractive American ski resorts and cross country skiing opportunities closer to Californian GRAMS that offer deluxe facilities and a more benign winter climate.

Trip Purpose

Figure 6 shows that the main purpose for the majority of GRAMS travel is visiting friends and relatives. Being out-of-doors was the next most important purpose in taking a trip, closely followed by city touring, attending special events, and taking a cruise. Staying at a resort was the least frequently mentioned purpose. Figure 7 shows somewhat surprisingly that age is inversely proportional to visiting friends and relatives which, as a purpose, had the strongest showing among 55 - 59 year olds and the weakest among 65 -74 year olds. This finding may suggest that older travellers desire variety in travel that is not usually associated with the predictable and secure settings of familiar people and places. It may also reflect the fact that employed seniors have to combine a number of purposes into their limited vacation time.

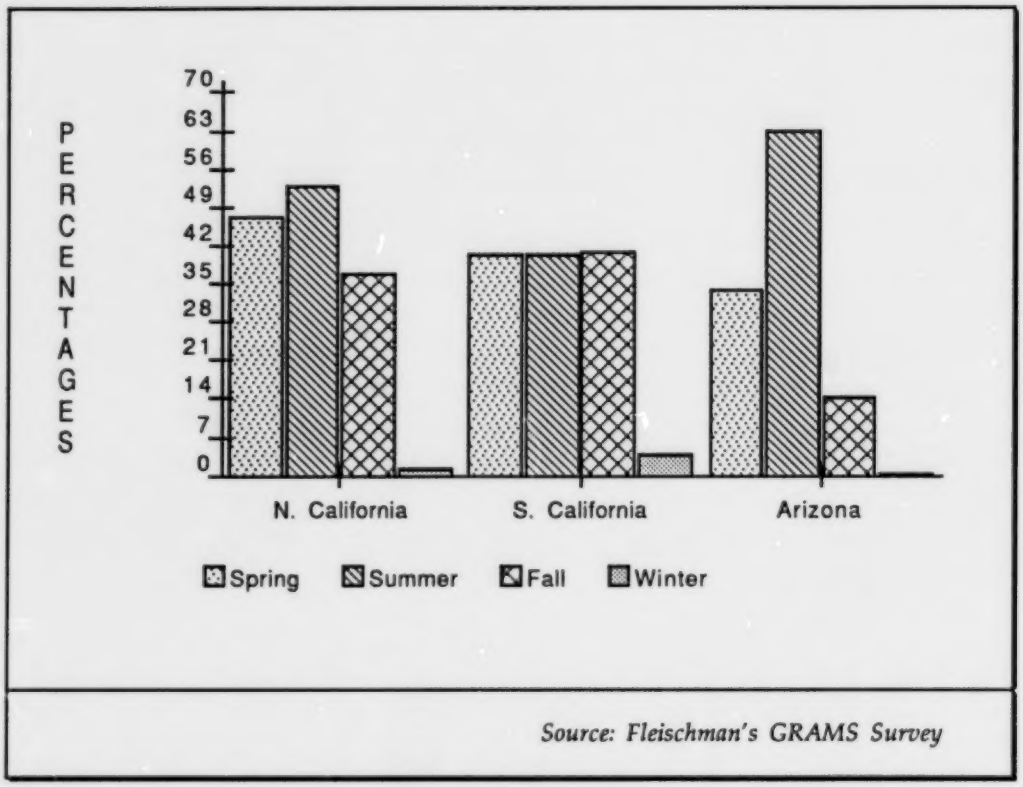
Interest in city touring peaks with the mid-stage mature travellers (60 to 64), seemingly at the expense of being out of doors. Many members of this age group use their recent entry into retirement to take a trip to Europe whose appeal is the city-based cultural attractions. The GRAMS data suggest that the cruise experience appeals to either the younger, non-retired mature market or to the older mature travellers. These differences in trip purpose, once again, emphasize the importance of giving special consideration to the interest of sub-groups within the GRAMS travel segment.

GRAMS Perceptions of and Interest in B.C.

The GRAMS market view B.C. as an attractive place to visit, yet only 4% of the sample indicated that they plan to visit the province in the next two years. This percentage compares to 13% for Hawaii, 13% for Alaska, 21% for Europe and 11% for Australia and New Zealand. While the survey included a number of questions regarding the type of trip and mode of travel to be used by those GRAMS indicating their intention to visit the province, the sample size (20 respondents) is too small to be interpreted with any degree of confidence.

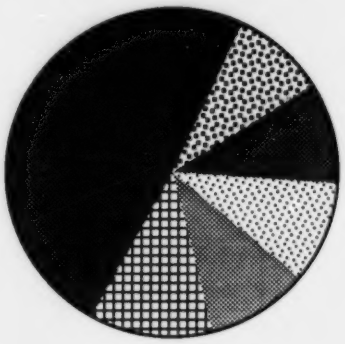
Figure 5

SEASON MOST LIKELY TO VISIT B.C. BY ORIGIN



Source: Fleischman's GRAMS Survey

Figure 6
MAJOR PURPOSE IN TAKING TRIPS (ALL MENTIONS)

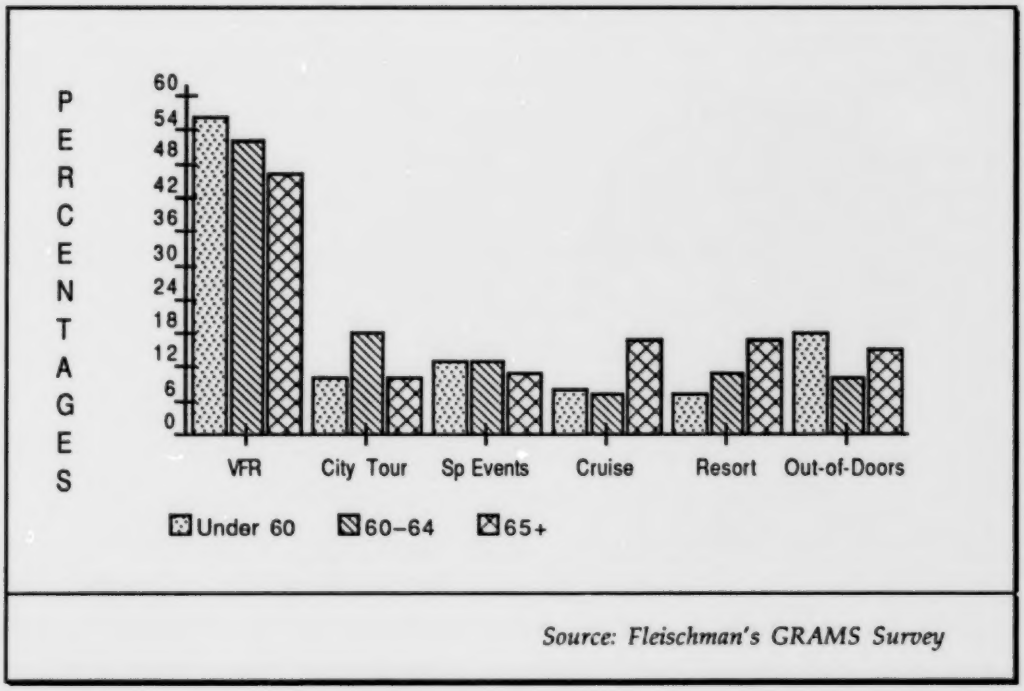


Resort Stay	7.0%
Other	9.0%
Cruise	10.0%
Special Events	10.0%
City Tour	10.0%
Out-of-Doors	12.0%
VFR	42.0%

Source: Fleischman's GRAMS Survey

Figure 7

MAJOR PURPOSE IN TAKING TRIPS BY AGE (ALL MENTIONS)



Source: Fleischman's GRAMS Survey

Attractiveness

All respondents were asked to rate the attractiveness of B.C. on a 10-point scale where 10 was "extremely attractive" and 1 was "not at all attractive". Approximately 60% of the sample gave a rating of 8 or more and the average rating for B.C. was 7.3. Unfortunately, ratings were not obtained for competitive destinations so it is difficult to know B.C.'s relative position. The result may be interpreted to mean that the majority of travellers have a favourable impression of the province.

Activities

All respondents were asked to rate their interest in participating in a set of 26 activities if they were to visit B.C. The ratings revealed a strong interest in activities related to observing places and things and a general lack of interest in physically active involvement in sports and outdoor recreation. The best rated activity was "seeing the countryside" and the worst rated, not surprisingly, was "mountain climbing".

The twenty-six activities can be categorized into six groups. Examining the market through these "activity bundles" provides more meaningful and manageable analysis of the list of activities. Table 7 illustrates the composition of the groups. A mean rating score was calculated for each of the activity bundles—those with the highest scores are likely to be of most interest to the GRAMS market.

Observing the countryside and nature is of pre-eminent interest to GRAMS travellers. This rural/nature activity bundle is oriented to the out-of-doors, scenery and natural habitat through fairly passive involvement. These activities can be enjoyed by travellers on day trips or by vacationers touring about on overnight excursions, either individually or in a group. While British Columbia's ability to deliver quality outdoor experiences is certainly clear, we may need to give more attention to the special needs and interests of the GRAMS market.

The next two activity bundles of greatest interest to GRAMS travellers focus on city travel. The cultural activity bundle includes interest in the performing arts, historical sights and museums. General city activities involve fairly diverse interests such as attending sports events, dining out, sightseeing and shopping.

Table 7
ACTIVITY BUNDLES

Activity	City	Cultural	Group Tours	Passive Recreation	Active Recreation	Rural/ Nature
			(Mean Ratings)			
Attending sports events, games	4.8					
Dining in local restaurants	7.6					
City sightseeing on your own	7.4					
Shopping for souvenirs	4.6					
Shopping for specialities of B.C.	5.4					
Theatre, ballet, opera, concerts		5.5				
Seeing historical sights		7.7				
Visiting museums and galleries		6.9				
Guided bus tours of the city			6.5			
Guided walking tours of the city			5.2			
Touring wineries			5.0			
Local Boat cruises/day trips			6.8			
Swimming				4.3		
Sun bathing				3.5		
Playing golf					3.0	
Playing tennis					2.2	
Sailing					2.6	
Canoeing or kayaking					2.1	
Guided hiking trips					3.1	
Hiking/camping on your own					3.4	
Mountain climbing					1.6	
Fresh-water fishing					4.6	
Deep-water fishing					4.0	
Visiting parks and gardens						7.3
Seeing the countryside						8.0
Whale watching						5.4
Mean Score	**5.9**	**6.7**	**5.9**	**3.9**	**3.0**	**6.9**

Source: Fleischman's GRAMS survey

While these interests can be enjoyed by travellers independently, the GRAMS market's interest in them suggests that encompassing a number of individual city-type products in a package deal might be warranted.

The group tour activity bundle clearly emphasizes the packaged product. GRAMS travellers revealed a relatively strong interest in the tour concept, especially in the form of touring by boat and by bus. Effective packages should combine these modes of transportation with appropriate attractions, food, entertainment and accommodations.

While recreational pursuits hold the least interest for the GRAMS market as a whole, special interest markets should not be ignored. The growing demand for "soft adventure" and interest in the chance to participate in activities rather than be merely spectators has been noticed by tour operators catering to seniors throughout North America.

The three age groups show the same level of interest in the activity bundles. Older travellers, however, consistently gave the lowest rating to all the activity bundles—surprisingly, playing golf and tennis were the only activities that they rated the same or higher than the other age groups. It is important to address why the older GRAMS almost always gave lower ratings. It is possible that the activities listed in the survey were too narrowly focussed and too heavily weighted toward recreational/sports activities.

Information Sources

Respondents were asked whether they had seen or heard any B.C. travel ads and, if so, where they had seen or heard them. The data suggest that 72% of the sample recalled seeing an ad, of which 45% had done so unaided and an additional 27% only recalled ads after being aided by the interviewer. Residents of northern California (79%) and seniors over 65 years of age (75%) had slightly better recall than the sample as a whole.

GRAMS members recalled seeing 31% of the ads in newspapers, 27% on television, 13% through direct mail and 1% on billboards (Table 8). In addition, 2% recalled hearing ads on the radio. Residents of northern California and respondents under the age of 60 were most likely to have seen ads on television, whereas newspapers supplied the most frequently mentioned source for residents of Southern California and Arizona and for GRAMS who were 60 years of age or older.

Table 8
RECALL OF B.C. ADVERTISING BY GRAMS MARKET

Type	Percentage Recall %
Magazines	43
Newspaper	31
Television	27
Direct Mail	13
Radio	2
Travel Literature	4
Other	5
(Total Recalling)	(321)

Source: Fleischman's GRAMS Survey (1988)

GRAMS travellers were asked to rate the usefulness of various sources of travel information as excellent, good, fair or poor. As is often the case in travel research, the recommendations of friends and relatives rated highest with magazine articles and brochures sent in the mail following a close second. Advertisements in general were judged to have lesser value than personal sources and published articles. Older mature travellers gave a lower average rating to all sources of travel information which might suggest that B.C. sources of information are missing the mark with this group. In particular, brochures by mail and magazine articles received comparably lower ratings. Efforts should be made to ensure that the quality of this type of travel information caters to the diverse needs and interests of the three age groups in the GRAMS market (see Table 9).

Table 9

ORGANIZATION MEMBERSHIP BY ORIGIN AND AGE

	Origin			Age		
	N. Cal	S. Cal	Ariz	55–59	60–64	65+
	%	%	%	%	%	%
A.A.R.P.	76	86	89	70	84	91
Other "Senior"	20	16	20	11	14	29
Environmental/Naturalist	12	14	11	7	14	13
AAA or other auto/RV clubs	80	73	55	68	69	71
RV clubs	13	8	15	10	15	13
None of the above	4	4	5	7	4	1

Source: Fleischman's GRAMS survey

Table 10

RANK ORDER OF TEN MOST FREQUENTLY READ NEWSPAPERS AND MAGAZINES

	Ranking			
	Overall	55–59	60–64	65+
Other local dailys*	1	1	1	1
Modern Maturity	2	4	2	2
National Geographic	3	2	3	3
Sunset	4	3	4	4
Better Homes and Gardens	5	5	5(tie)	6
Time	6	6	5 (tie)	8
Other weeklys	7	7	8	7
National papers	8	10	7	5
Arizona Highways	9	9	11	9
Newsweek	10(tie)	9	10	11
Smithsonian	10(tie)	11	9	10

* L.A. Times and S.F. Chronicle/Examiner ranked 12th overall

Source: Fleischman's GRAMS Survey (1988)

Membership and Readership

Knowing what organizations the GRAMS market belongs to and which publications they read will help ensure that travel-related products are promoted at appropriate times and in appropriate locations. Table 9 shows organization membership by origin and age. Membership rates were highest in the American Association of Retired Persons (AARP), the American Automobile Association and other auto clubs. Residents of Arizona and Southern California were more likely to be involved in the AARP than their counterparts in Northern California where membership in auto clubs seems to be more important. Membership in organizations increases with age and is probably related to widowed seniors' desire for companionship and the increased amount of time that accompanies retirement. GRAMS who were 65 or more joined an average of 2.2 organizations per person, compared to those under 60 who were involved in 1.7 organizations per person.

The survey asked respondents to state how often they read a specified list of 16 newspapers and periodicals. (see Table 10). The most frequently read item was "other local dailys" which are selective in where they reach but not necessarily who they reach. The sample indicated that the most regularly read magazine was Modern Maturity followed by National Geographic. Sunset Magazine was ranked fourth overall, giving seniors-oriented periodicals two of the top four ranked positions. Given the relative importance of magazine articles as a source of information for seniors, greater publicity coverage and articles in these senior publications could assist British Columbia position itself positively in the minds of the GRAMS consumer.

CONCLUSIONS AND RECOMMENDATIONS

1. The senior market for travel to British Columbia is a large, attractive one because of the tendency for many seniors to make longer vacation trips and to travel in off-peak periods.

2. The market is not an homogeneous one and, to be successful, marketers must resist the tendency to lump all seniors together. While segmentation on the basis of age provides a useful "shorthand" approach for understanding the senior market, marketers must move beyond age segmentation and identify target markets seeking similar travel benefits and sharing similar needs and preferences.

3. The GRAMS research suggests that the older mature traveller (65+) resident in California and Arizona presents the greatest potential for British Columbia as this group is most interested in distant destinations and is looking for cultural and educational experiences found in exotic places. British Columbia/Canada's competition is Europe, Australia and New Zealand, Alaska and, increasingly, the Far East. British Columbia should continue to be positioned as part of the Canada West experience and as having foreign mystique and providing the chance to experience cultural and geographic diversity in a safe and attractive environment.

4. British Columbia appears to have less appeal to the younger mature market (55 to 59) who are still constrained by the time demands associated with employment and who are seeking fun and relaxation on their shorter vacations. Since these seniors are already well travelled and sophisticated in their demands, the best opportunities lie in attracting special interest groups such as ardent fishermen, golfers, skiers, nature observation enthusiasts who wish to use their valuable vacation time to pursue their hobbies and interests in an environment with world class products.

5. While awareness of and interest in British Columbia as a vacation destination was high immediately prior to Expo 86, the GRAMS data show a significant decline in intentions to visit compared to most other destinations. When it comes to places intended to visit in the next two years, British Columbia drops to 11th on the list and has the greatest percentage decrease in mentions as a place visited compared to a place that might be visited in the future. At the same time, interest by the GRAMS

market in other Pacific Rim destinations shows considerable growth. These findings suggest that we would be well advised to position British Columbia as a "Gateway to the Pacific"—either north to the Alaskan portion of the Pacific Rim or "West to the East". Again, Vancouver's cultural diversity and Asian "flavour" could be marketed to advantage as an opportunity to preview the Pacific c Rim prior to departing the North American Continent.

6. The three most popular sets of activities of interest to the GRAMS market were: 1. Observing the countryside and nature; 2. city-related activities; and 3. tours. Other research indicates that an increasingly popular way of catering to all three of these interests is to develop "hub and spoke" tours from city centres such as Vancouver and Victoria. A variety of day excursions can be offered radiating out from the city and catering to diverse needs and interests. By overnighting in one centre, seniors are spared the time consuming and tiring task of packing and unpacking everyday and can avoid the stress associated with adjusting to new surroundings and accommodations. Together with Tourism Vancouver and Tourism Victoria, the Ministry should explore the potential for developing more senior-oriented, hub and spoke packages.

7. Since the sample size of the GRAMS survey was only 500, it was impossible to obtain a large enough sample of past and potential visitors to B.C. to undertake a detailed analysis of this sub group. The data obtained in Visitors '87 could be analyzed to determine how the travel patterns of seniors aged 55 and over differ from the visitor population as a whole. This data is recent and comprehensive. We therefore recommend that the Ministry request that all the questions on Visitors '87 be cross tabulated against age in order to shed more light on this diverse market.

8. Given the importance and complexity of the senior market to the travel industry, the GRAMS study should be viewed as an initial attempt at acquiring some primary data about this market. More research needs to be undertaken into the following: ways of improving the packaging of products for the seniors market; ways of improving the delivery of services; the identification of specific market segments and their needs and preferences; and the identification of both media and potential partners for joint promotions to this market.

APPENDIX A.

The Questionnaire

08327

DATE: _____

INTERVIEWER: _____

Hello, I'm calling long distance for Carol Adams of National Family Opinion in Toledo, Ohio. May I please speak to the Male/Female age 55-75 in your household. **(CHECK QUOTAS. ASK FOR MALE FIRST. IF NO MALE PRESENT ASK FOR FEMALE. CONTINUE WHEN PROPER RESPONDENT IS ON THE PHONE. REPEAT LEAD-IN IF NECESSARY)** Today I'm calling you about traveling.

1. a. First, I'd like to know how many pleasure trips, if any, you've taken in the past 12 months where your destination was at least 1000 miles away? **(DO NOT ACCEPT A RANGE. ASSIST RESPONDENT BY REFERRING TO AREAS CIRCLED ON MAP)**

trips_____ - **(IF 1 OR MORE SKIP TO QU. 1d)** (9)

b. Have you taken any pleasure trips where your destination was 500 to 1000 miles away in the past 12 months?

Yes, 500-1000 miles away . . . 1

c. Have you taken any overnight pleasure trips where your destination was less than 500 miles away in the past 12 months?

Yes, overnight trips less than 500 miles away 2

No, Neither, Don't know . . . 3 (10)

d. What would be your best guess as to the number of pleasure trips of at least 1000 miles that you'll take during the next 12 months?

trips_____ - **(IF 1 OR MORE SKIP TO QU. 2a)** (11)

e. Do you think you may take any pleasure trips where your destination is 500 to 1000 miles away during the next 12 months?

Yes, 500-1000 miles away . . . 1

f. Do you think you may take any overnight pleasure trips where your destination is less than 500 miles during the next 12 months?

Yes, overnight trips less than 500 miles away 2

No, Neither, Don't know . . . 3 (12)

(INTERVIEWER NOTE: TERMINATE UNLESS ANSWER TO QUESTION 1a AND/OR QUESTION 1d IS 1 OR MORE)

2. a. To what destinations have you traveled on pleasure trips of 1000 miles or more in the past two years? **(DO NOT READ LIST)** **(PROBE:)** What other destinations? **(RECORD ALL RESPONSES UNDER COLUMN "2a")**

NONE ☐

b. Where did you go on your **most recent** pleasure trip of 1000 miles or more? **(DO NOT READ LIST)** **(PROBE)** **(RECORD ONE RESPONSE UNDER COLUMN "2b")**

NONE ☐ **– IF NONE IN QUESTION 2a AND QUESTION 2b, SKIP TO QUESTION 4.**

	"Qu. 2a"	"Qu. 2b"
U.S.A.	(13)	(14)
Home State (See phone card)	NA	NA
States west of Mississippi River	2	2
States east of Mississippi River	3	3
Hawaii	4	4
Alaska	5	5
CANADA:		
British Columbia	6	6
Other Western Canada	7	7
Ontario	8	8
Quebec	9	9
Other Eastern Canada	X	X
OTHER PLACES:	(15)	(16)
Bahamas, Bermuda, Caribbean	1	1
Central America, Mexico	2	2
South America	3	3
Europe	4	4
Africa	5	5
Asia, India, Far East	6	6
Australia, New Zealand	7	7
Other Pacific Islands	8	8

3. Which of the following best describes your major purpose in taking that trip? **(READ LIST) (DO NOT PROBE) (ACCEPT MULTIPLES)**

	Visiting friends, relatives	1
	City touring	2
	Attending special events	3
	Taking a cruise	4
	Staying at a resort	5
	Being in the out of doors	6
(DO NOT READ)	Other (Specify):_____	7
(DO NOT READ)	Don't know/Refused	X

(17)

4. a. To what destinations do you think you may travel in the next two years? **(DO NOT READ LIST) (RECORD FIRST MENTION ONLY) (RECORD ALL OTHER MENTIONS UNDER COLUMN "4b")**

b. Any others? **(RECORD UNDER COLUMN "4b")**

* **REFER TO LIST OF BRITISH COLUMBIA CITIES/REGIONS.**

		"Qu. 4a"	"Qu. 4b"
	U.S.A.	(18)	(19)
	Home State (See phone card)	1	1
	States west of Mississippi River	2	2
	States east of Mississippi River	3	3
	Hawaii	4	4
	Alaska	5	5
	CANADA:		
(Record City/ Region If Mentioned)	British Columbia_____	6	6
	Other Western Canada	7	7
	Ontario	8	8
	Quebec	9	9
	Other Eastern Canada	X	X
	OTHER PLACES:	(20)	(21)
	Bahamas, Bermuda, Caribbean	1	1
	Central America, Mexico	2	2
	South America	3	3
	Europe	4	4
	Africa	5	5
	Asia, India, Far East	6	6
	Australia, New Zealand	7	7
	Other Pacific Islands	8	8
(DO NOT READ)	None, Don't know	X	X

(INTERVIEWER NOTE: **ASK QUESTIONS 5-8 ABOUT BRITISH COLUMBIA IF MENTIONED IN QUESTION 4a,b (CODE 6); OTHERWISE SKIP TO QUESTION 9a)**

5. When you visit British Columbia, what is likely to be your primary means of transportation to get there? **(DO NOT READ LIST) (RECORD ONE RESPONSE)**

Automobile	1	
"R.V."	2	
Bus	3	
Airplane	4	
Train	5	
Ship	6	
Don't know/Refused	X	(22)

6. On that trip, how many are likely to be in your party, including yourself? **(DO NOT ACCEPT A RANGE) (RECORD ONE RESPONSE)**

#_____ (23)

7. For how long are you likely to be gone? **(RECORD IN DAYS) (DO NOT ACCEPT A RANGE)**

#_____days (24-25)

8. a. Where do you think you would stay, primarily, when you got there? **(DO NOT READ LIST) (RECORD ONE RESPONSE)**

At a resort hotel	1
At other hotels, motels	2
With friends, relatives	3
Hiking/camping out of doors	4
On a cruise ship	5
Other (Specify):_____	6
Don't know/Refused	X

(26)

b. Which of the following best describes your **major purpose** in taking that trip? **(READ LIST) (DO NOT PROBE) (ACCEPT MULTIPLES)**

	Visiting friends, relatives	1
	City touring	2
	Attending special events	3
	Taking a cruise	4
	Staying at a resort	5
	Being in the out of doors	6
(DO NOT READ)	Other (Specify):_____	7
(DO NOT READ)	Don't know/Refused	X

(27)

c. Which of any of the following things might you do on that trip? **(READ LIST) (ACCEPT MULTIPLES)**

	Attending sporting events	1
	Attending theater, ballet, opera, concerts	2
	Attending other special events, exhibits	3
	Dining in local restaurants	4
	Participating in active sports like golf, tennis, boating	5
	Seeing the city	6
	Seeing the countryside	7
	Shopping	8
	Visiting museums and galleries	9
	Visiting parks and gardens	0
	Visiting amusement or theme parks	X
(DO NOT READ)	None of these, Don't know (only if no other activities are mentioned)	Y

(28)

9. a. For which of the **Canadian Provinces**, if any, have you seen or heard any vacation travel advertising in the past 6 months? **(DO NOT READ LIST) (IF BRITISH COLUMBIA MENTIONED RECORD UNDER BRITISH COLUMBIA UNAIDED ADVERTISING RECALL AND SKIP TO QU. 9c. WRITE IN ALL OTHER PROVINCES MENTIONED IN SPACE PROVIDED)**

b. Do you recall any vacation travel advertising for British Columbia?

c. Do you happen to have visited British Columbia on a vacation or other pleasure trip in the past two years?

	British Columbia	Others (Specify)
9a. Unaided advertising recall	1 (SKIP TO QU. 9c)	_____
9b. Aided advertising recall	2	_____
9c. Visited	3	_____
None of these	4	_____ (29)

d. **(ASK ONLY IF BRITISH COLUMBIA ADVERTISING RECALLED IN QU. 9a or 9b. OTHERWISE SKIP TO QU. 10)** Where did you see or hear the advertising for British Columbia? **(ACCEPT MULTIPLES)**

Newspaper 1

Radio 2

Television 3

Billboard 4

Direct mail 5

Other (Specify):_____ 6 (30)

10. **Based on your past experience plus what you've seen or heard, how attractive would British Columbia be to you as a future vacation destination? Please answer on a scale from one to ten, with ten meaning "extremely attractive" and one meaning "not at all attractive". (RECORD ONE RESPONSE. DO NOT ACCEPT A RANGE)**

Not At All Attractive									Extremely Attractive	
1	2	3	4	5	6	7	8	9	10	(31)

11. If you were to visit British Columbia on some future vacation trip, during what months would that most likely be? **(ACCEPT MULTIPLES)**

January	1
February	2
March	3
April	4
May	5
June	6
July	7
August	8
September	9
October	0
November	X
December	Y
Don't know/Refused	Z

(32)

12. Now I'd like to read you a list which includes a variety of activities that might be available if you were to visit British Columbia. Please rate each one on a scale from one to ten, with ten meaning that you'd be "Extremely Interested" in doing that and one meaning that you'd have "No Interest At All". **(ROTATE, BEGINNING WITH "✓'D" ACTIVITY) (REPEAT SCALE AS NECESSARY)**

ROTATE:	No Interest At All									Extremely Interested	
☐ Attending sports events, games	1	2	3	4	5	6	7	8	9	10	(33)
☐ Theater, ballet, opera, concerts	1	2	3	4	5	6	7	8	9	10	(34)
☐ Dining in local restaurants	1	2	3	4	5	6	7	8	9	10	(35)
☐ Guided bus tours of the city	1	2	3	4	5	6	7	8	9	10	(36)
☐ Guided walking tours of the city	1	2	3	4	5	6	7	8	9	10	(37)
☐ City sightseeing on your own	1	2	3	4	5	6	7	8	9	10	(38)
☐ Seeing historical sights	1	2	3	4	5	6	7	8	9	10	(39)
☐ Visiting museums and galleries	1	2	3	4	5	6	7	8	9	10	(40)
☐ Visiting parks and gardens	1	2	3	4	5	6	7	8	9	10	(41)
☐ Local boat cruises/ day trips	1	2	3	4	5	6	7	8	9	10	(42)
☐ Touring wineries	1	2	3	4	5	6	7	8	9	10	(43)
☐ Seeing the countryside	1	2	3	4	5	6	7	8	9	10	(44)
☐ Shopping for souvenirs	1	2	3	4	5	6	7	8	9	10	(45)
☐ Shopping for things special to British Columbia	1	2	3	4	5	6	7	8	9	10	(46)
☐ Playing golf	1	2	3	4	5	6	7	8	9	10	(47)
☐ Playing tennis	1	2	3	4	5	6	7	8	9	10	(48)
☐ Sailing	1	2	3	4	5	6	7	8	9	10	(49)
☐ Canoeing or kayaking	1	2	3	4	5	6	7	8	9	10	(50)
☐ Guided hiking trips	1	2	3	4	5	6	7	8	9	10	(51)
☐ Hiking/camping on your own	1	2	3	4	5	6	7	8	9	10	(52)
☐ Mountain climbing	1	2	3	4	5	6	7	8	9	10	(53)
☐ Fresh water fishing	1	2	3	4	5	6	7	8	9	10	(54)
☐ Deep water fishing	1	2	3	4	5	6	7	8	9	10	(55)
☐ Swimming	1	2	3	4	5	6	7	8	9	10	(56)
☐ Sun bathing	1	2	3	4	5	6	7	8	9	10	(57)
☐ Whale watching	1	2	3	4	5	6	7	8	9	10	(58)

(80-1)

13. Information about possible vacation travel destinations might come to you in several ways. I'll read a short list of them. For each one, please tell me how you would rate it -- "Excellent", "Good", "Fair", or "Poor" -- as a useful source of travel information. **(READ LIST) (RECORD ONE RESPONSE FOR EACH SOURCE) (REPEAT SCALE AS NECESSARY)** (DUPL. 1-9)

	Excellent	Good	Fair	Poor	Don't Know	
Brochures by mail	1	2	3	4	5	(10)
Radio advertising	1	2	3	4	5	(11)
Television advertising	1	2	3	4	5	(12)
Newspaper advertising	1	2	3	4	5	(13)
Newspaper articles	1	2	3	4	5	(14)
Magazine advertising	1	2	3	4	5	(15)
Magazine articles	1	2	3	4	5	(16)
Travel agent recommendations	1	2	3	4	5	(17)
Friends or relatives	1	2	3	4	5	(18)

14. How often do you read each of the following publications -- "Regularly", Fairly Often", "Occasionally", or "Never"? **(READ LIST) (RECORD ONE RESPONSE FOR EACH PUBLICATION) (REPEAT SCALE AS NECESSARY)**

	Regularly	Fairly Often	Occasionally	Never	
National papers (such as the Wall Street Journal, Christian Science Monitor, etc.)	1	2	3	4	(19)
Los Angeles Times	1	2	3	4	(20)
San Francisco Chronicle/Examiner	1	2	3	4	(21)
Other local daily newspapers	1	2	3	4	(22)
Time Magazine	1	2	3	4	(23)
Newsweek	1	2	3	4	(24)
Other weekly news magazines	1	2	3	4	(25)
Arizona Highways	1	2	3	4	(26)
Better Homes & Gardens	1	2	3	4	(27)
"Los Angeles" Magazine	1	2	3	4	(28)
National Geographic	1	2	3	4	(29)
Modern Maturity Magazine	1	2	3	4	(30)
"San Francisco" Magazine	1	2	3	4	(31)
Smithsonian	1	2	3	4	(32)
Sunset	1	2	3	4	(33)
Southwest Profile	1	2	3	4	(34)

15. We'd be interested to know if you or anyone in your household belong to these organizations. How about the . . . **(READ LIST) (ACCEPT MULTIPLES)**

American Association of Retired Persons 1 (35)

Any other organizations for "seniors"
(Specify):_____ 2

Environmental/Naturalist groups
(Specify):_____ 3

AAA or other Auto Clubs
(Specify):_____ 4

R.V. Clubs (K.O.A., etc.)
(Specify):_____ 5

(80-2)

16. Just for our records, may I have your age please?

_____

17. **(RECORD SEX FROM VOICE):**

Male 1

Female 2

(THANK RESPONDENT AND TERMINATE)